

MY ASSETS

As a registered USER of Maurice Lee & Tan, you can enjoy the use MY ASSETS as a registry of your assets. It is a good practice for you to keep an updated list of assets. Your Executor will have an easier task in the application for the Grant of Probate if he has a list of your assets as a starting point. You can continuously update your assets anytime and anywhere. You can have a summary of all your assets to view in your convenience.

To begin, Click **CREATE ASSET** and select the Asset Class that you want to populate.

PROPERTY

You can populate a complete list of all your properties that you own in Singapore and overseas too.

Example: You own a property at 128 Bayshore Road Singapore 451884.

Description of Asset: You may wish to describe it as Bayshore Road Property for easy reference.

Asset Type: Property

Property Address: 128 Bayshore Road

Postal Code: 451884

Country: Singapore

You may wish to provide the name of your **property agent, mobile and email** in the event that your Executor needs clarifications on the details on the purchase of the said property.

Details of Assets: (You may input details like whether there is currently any bank loan or CPF monies used etc. If there is bank loan, you can indicate the Bank and the amount borrowed.)

Upload: You may wish to upload a copy of the title deed, mortgage documents for the said property.

Click **SUBMIT** when ready.

BANK ACCOUNT

You can populate a complete list of your bank accounts under this asset class.

Example: You have a bank account no: 12345678 (Fixed Deposit) with DBS Bank Ltd.

Description of Asset: DBS FD

Account Type: Bank Account

Account No: 12345678

Name of Bank: DBS Bank Ltd

If you have a Personal Relational Manager, you can populate his name, mobile and email in the event that your Executor needs to contact him during the Probate application.

Details of Assets: (You may wish to provide details on the specific type of bank account etc).

Upload: You can upload current bank statement into your registry for ease of reference.

Click **SUBMIT** when ready.

INSURANCE POLICY

You can upload a list of insurance that you have taken up under this asset class.

Example: You have a life insurance policy no 123456789 on your life for S\$1,000,000 with Great Eastern Life Assurance Company Ltd

Description of Asset: Great Eastern Life Policy 1 (you can name another GE Life policy as 2 if more than 1 policy with GE Life)

Account Type: Insurance Policy

Name of Insurer: Great Eastern Life Assurance Company Ltd

Insurance Policy No: 123456789

Amount Insured: \$1,000,000

Currency: S\$

You may wish to upload the name of your Financial Advisor **name, mobile and email** in the event that your Executor need to contact him for clarifications.

Details of Assets: (You may wish to indicate whether you have made any nomination with the insurer as provided under the law of Singapore. Check with your Financial Advisor if you are unsure).

Upload: You may upload policy documents, original proposal for your FA for easy reference.

Click **SUBMIT** when ready.

SECURITIES

This asset class relates to shares that you may own in any company worldwide. You might own shares in company that may be privately held (unlisted) or listed on any stock exchange in the world.

Example: You owned 1000 ordinary shares in Happy Life (S) Pte Ltd (UEN:201912345G) which is unlisted.

Description of Asset: 1000 shares in Happy Life (S) Pte Ltd

Account Type: Securities

Name of Company: Happy Life (S) Pte Ltd

UEN: 201912345G

No of shares that you owned: 1,000

Class of shares: Ordinary

Company Status: Unlisted*

Details of Assets: (you may wish to describe what kind of business that this company is in and what is your role etc)

Upload: You may upload latest ACRA Search on this company for easy reference.

Click **SUBMIT** when ready.

* if your company is listed, you need to provide your CDP Account No.

OTHERS

Under this asset class, it may be a painting, a piece of jewellery, a car or even a pet. Please describe the asset class as detailed as possible.

Example1: You have a pet dog named JOY.

Description of Asset: Pet dog JOY

Account Type: Others

Details of Assets: White silky terrier.

Upload: You may wish to upload a photo of JOY.

Click **SUBMIT** when ready.

Example2: You have a painting (Happy) by an artist named Famous1

Description of Asset: My painting Happy

Account Type: Others

Details of Assets: (Describe the name of the artist and where the painting is stored)

Upload: You may wish to upload a photo of the painting for easy reference.

Click **SUBMIT** when ready.